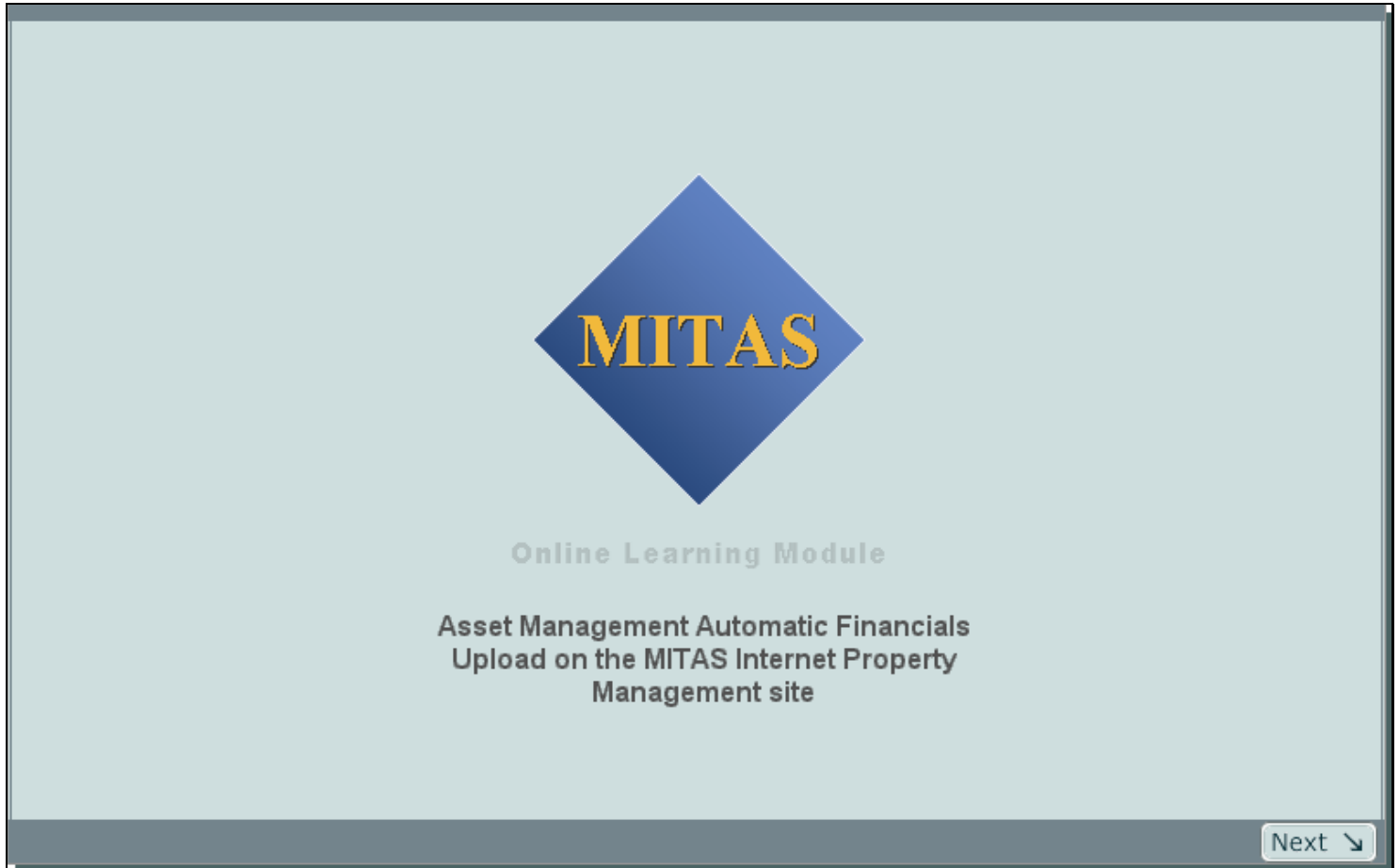


**Slide 1 - Title**

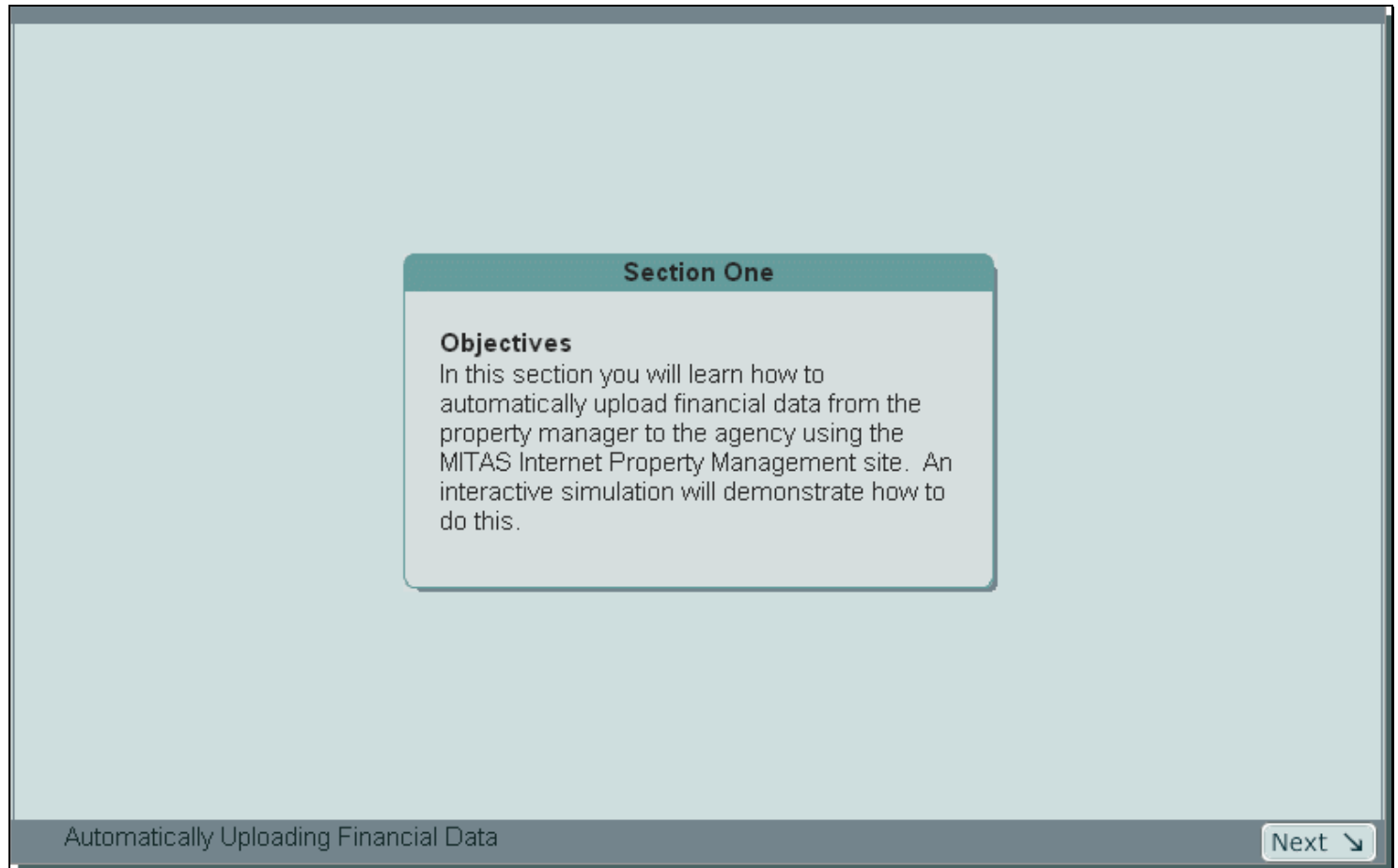


**Text Captions**

**Asset Management Automatic Financials Upload on the MITAS Internet Property Management site**

**Notes**

## Slide 2 - Objectives

A presentation slide with a light blue background. In the center is a white box with a teal header labeled "Section One". Inside this box, the word "Objectives" is bolded, followed by a paragraph of text. At the bottom of the slide, there is a dark blue footer bar containing the text "Automatically Uploading Financial Data" on the left and a "Next" button with a right arrow on the right.

**Section One**

**Objectives**  
In this section you will learn how to automatically upload financial data from the property manager to the agency using the MITAS Internet Property Management site. An interactive simulation will demonstrate how to do this.

Automatically Uploading Financial Data [Next](#)

## Text Captions

**Section One****Objectives**

In this section you will learn how to automatically upload financial data from the property manager to the agency using the MITAS Internet Property Management site. An interactive simulation will demonstrate how to do this.

Automatically Uploading Financial Data

**Notes**

## Slide 3 - Scenario

**Scenario**

Vicky, a property manager calls you...

*"Hi Becky, I'm trying to upload my financial data automatically to the agency using the MITAS Internet Property Management site for the first time. How do I do this?"*

Let's find out how we can help Vicky.

**Uploading Financial Data**

Vicky at her desk

Next ➤

**Text Captions****Scenario**

Vicky, a property manager calls you...

*"Hi Becky, I'm trying to upload my financial data automatically to the agency using the MITAS Internet Property Management site for the first time. How do I do this?"*

Let's find out how we can help Vicky.

**Notes**

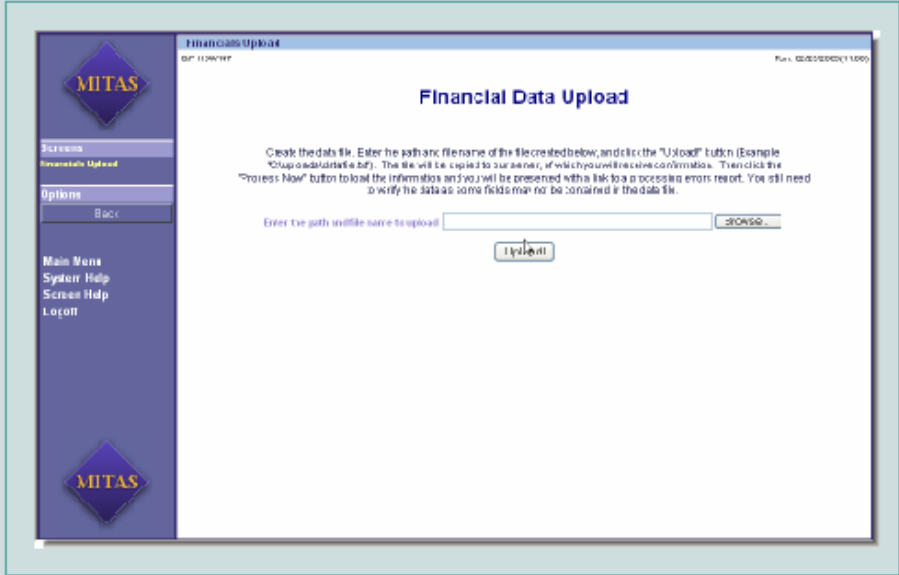
## Slide 4 - Concept

### How to Upload Financial Data

It is easy to upload financial data to the agency using the MITAS Internet Property Management site. In order to do this, you must first login as either a **Property Manager** or **Property Manager - Financials**.

Then you retrieve the property from the **Property / Project** screen. You choose the **Financials Upload** option, and the **Financials Upload** page is displayed. Choose your **Federal ID**, **Fiscal Year**, and **Fiscal Month**. The last step is to input the **Path and File Name** to upload, and press the **Upload** button.

Once your data has been uploaded, you review the financial data and then finalize the data for the agency.



Financial Data Upload page

[Next](#)

## Text Captions

## How to Upload Financial Data

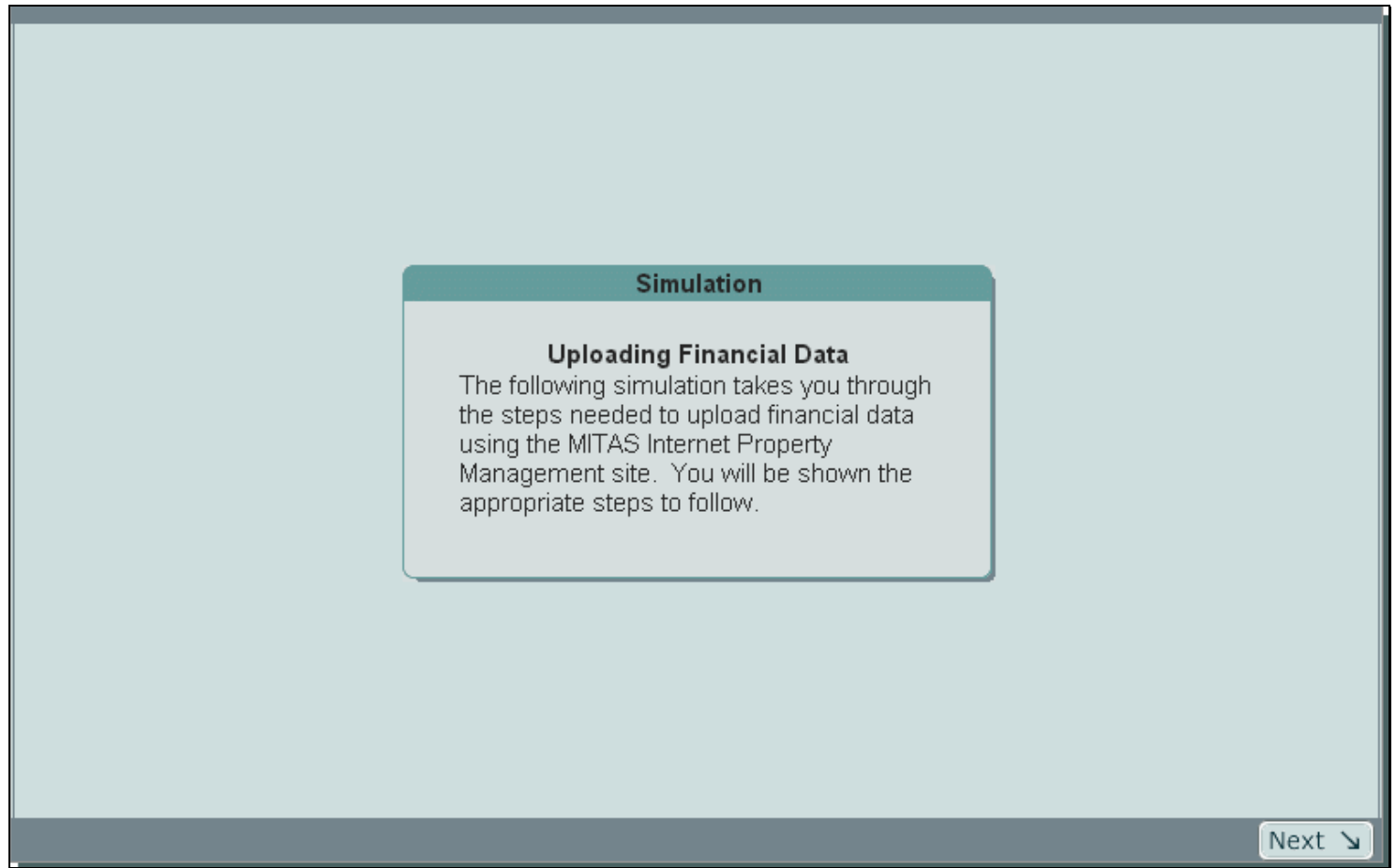
It is easy to upload financial data to the agency using the MITAS Internet Property Management site. In order to do this, you must first login as either a **Property Manager** or **Property Manager - Financials**.

Then you retrieve the property from the **Property / Project** screen. You choose the **Financials Upload** option, and the **Financials Upload** page is displayed. Choose your **Federal ID**, **Fiscal Year**, and **Fiscal Month**. The last step is to input the **Path and File Name** to upload, and press the **Upload** button.

Once your data has been uploaded, you review the financial data and then finalize the data for the agency.

## Notes

## Slide 5 - Simulation

A presentation slide with a light blue background. In the center is a white rectangular box with a teal header bar. The header bar contains the word "Simulation" in white. Below the header, the box is titled "Uploading Financial Data" in bold. The text below the title describes a simulation for uploading financial data using the MITAS Internet Property Management site. In the bottom right corner of the slide, outside the central box, is a "Next" button with a right-pointing arrow.

**Simulation**

**Uploading Financial Data**

The following simulation takes you through the steps needed to upload financial data using the MITAS Internet Property Management site. You will be shown the appropriate steps to follow.

Next ➤

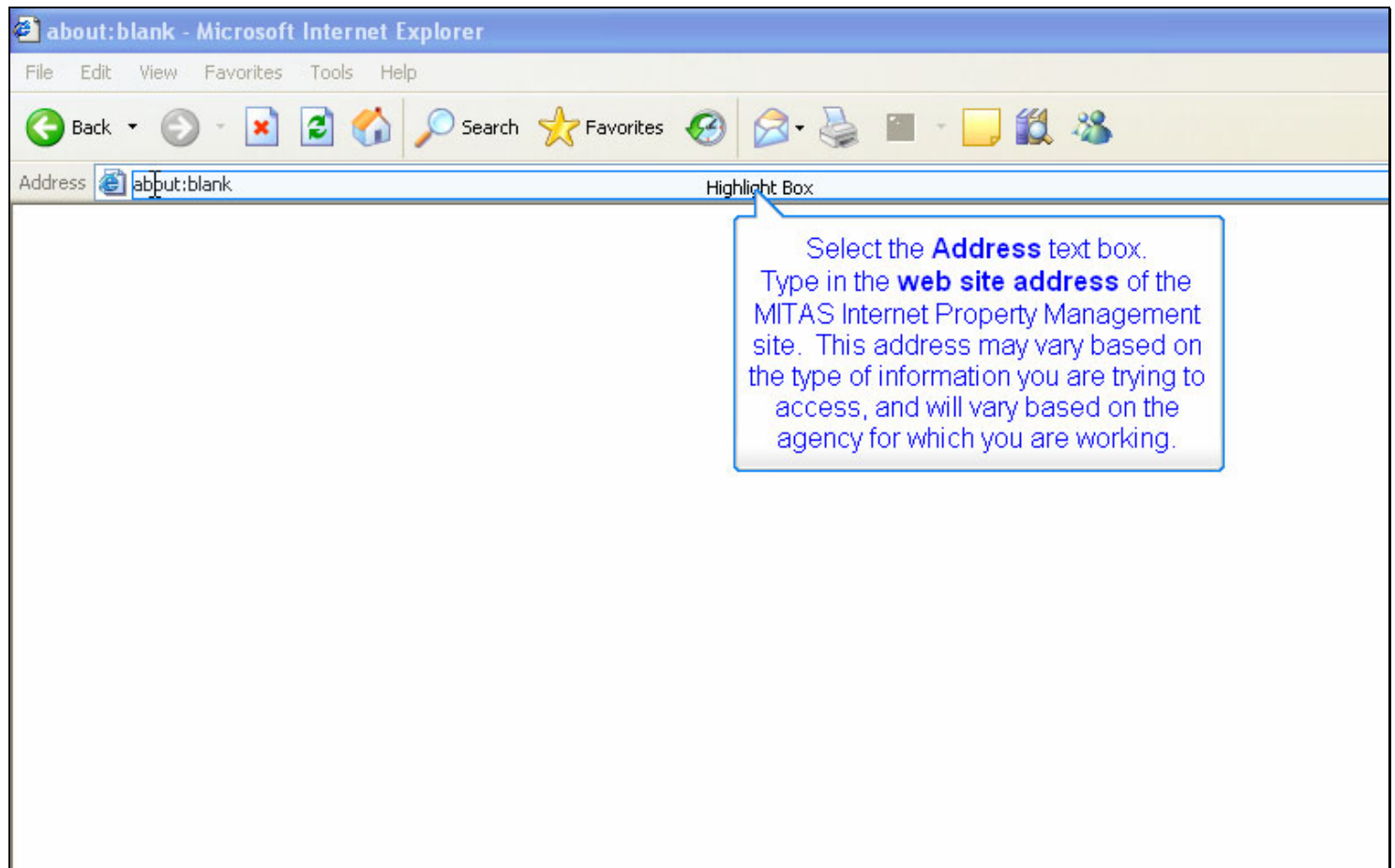
## Text Captions

**Simulation****Uploading Financial Data**

The following simulation takes you through the steps needed to upload financial data using the MITAS Internet Property Management site. You will be shown the appropriate steps to follow.

**Notes**

## Slide 6 - Slide 6





## Text Captions

Select the **Address** text box.  
Type in the **web site address** of the  
MITAS Internet Property Management  
site. This address may vary based on  
the type of information you are trying to  
access, and will vary based on the  
agency for which you are working.

## Notes

Slide 7 - Slide 7

Address  about:blank



Press **Enter** key

Text Captions

Press **Enter** key

Notes

## Slide 9 - Slide 9

Address http://www.mitas.com/mshda/

**MITAS**

Welcome to the **MITAS**  
Internet Property Management Site

The MITAS Internet Property Management Login page appears

Please log in:

Web Profile:

Originator:

Branch:

Username:

Password:

Password is case sensitive.

Select the **Web Profile** box

## Text Captions

The MITAS Internet Property Management Login page appears

Select the **Web Profile** box

## Notes



## Slide 10 - Slide 10

Address  http://www.mitas.com/mshda/



**Welcome to the MITAS**  
Internet Property Management Site

Depending on the way your agency is set up, there are two valid Property Manager items that you could choose: **Property Manager** or **Property Manager - Financials**. A **Property Manager** can view and input data for both compliance and financials. A **Property Manager - Financials** can view and input data for only financials. Your agency may have established both types of property manager items or only one option may be valid.

**Please log in:**

Web Profile:

Originator:

Branch:

Username:

Password:

Select the appropriate **Property Manager** item (Property Manager or Property Manager - Financials)

Property Manager - Financials


## Text Captions


Select the appropriate **Property Manager** item (Property Manager or Property Manager - Financials)

Depending on the way your agency is set up, there are two valid Property Manager items that you could choose: **Property Manager** or **Property Manager - Financials**. A **Property Manager** can view and input data for both compliance and financials. A **Property Manager - Financials** can view and input data for only financials. Your agency may have established both types of property manager items or only one option may be valid.

## Notes

## Slide 11 - Slide 11

Address  http://www.mitas.com/mshda/



## Welcome to the MITAS Internet Property Management Site

The **Property Manager Number** is the company or agency number. You cannot view or input data for more than one company or agency at a time.

Please log in:

Web Profile:

Property Manager Number:

Username:

Password:

Password is

Login

Select the **Property Manager Number** text box, and input the appropriate number


## Text Captions


Select the **Property Manager Number** text box, and input the appropriate number

The **Property Manager Number** is the company or agency number. You cannot view or input data for more than one company or agency at a time.

## Notes


## Slide 12 - Slide 12

Address  http://www.mitas.com/mshda/



Welcome to the **MITAS**  
Internet Property Management Site

Please log in:

Web Profile: Property Manager - Financials 

Property Manager Number:

Username:  Highlight Box

Password:

Password is case sensitive

Login


Select the **Username** text box, and input your username (do not use an administrator username)


## Text Captions

Select the **Username** text box, and input your username (do not use an administrator username)

## Notes

## Slide 13 - Slide 13

Address  http://www.mitas.com/mshda/



Welcome to the **MITAS**  
Internet Property Management Site

Please log in:

Web Profile:

Property Manager Number:

Username:

Password:

Password is case sensitive.


Select the **Password** text box, and input your password. **Passwords are case sensitive.**


## Text Captions

Select the **Password** text box, and input your password. **Passwords are case sensitive.**

## Notes

## Slide 14 - Slide 14

Address  http://www.mitas.com/mshda/



Welcome to the **MITAS**  
Internet Property Management Site

Please log in:

Web Profile:

Property Manager Number:

Username:

Password:

Password is case sensitive.

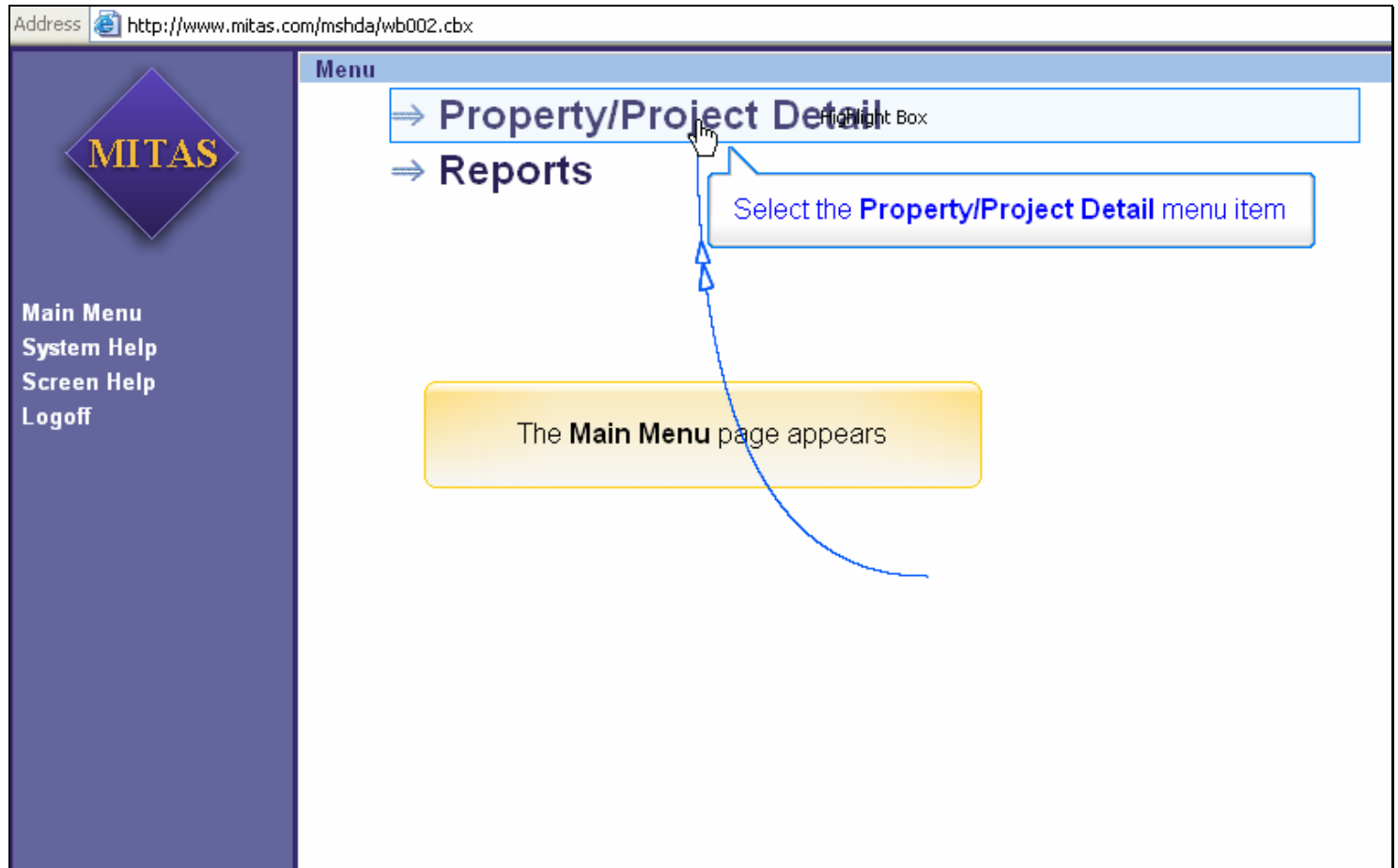
Click the **Login** button

Text Captions

Click the **Login** button

Notes

## Slide 16 - Slide 16



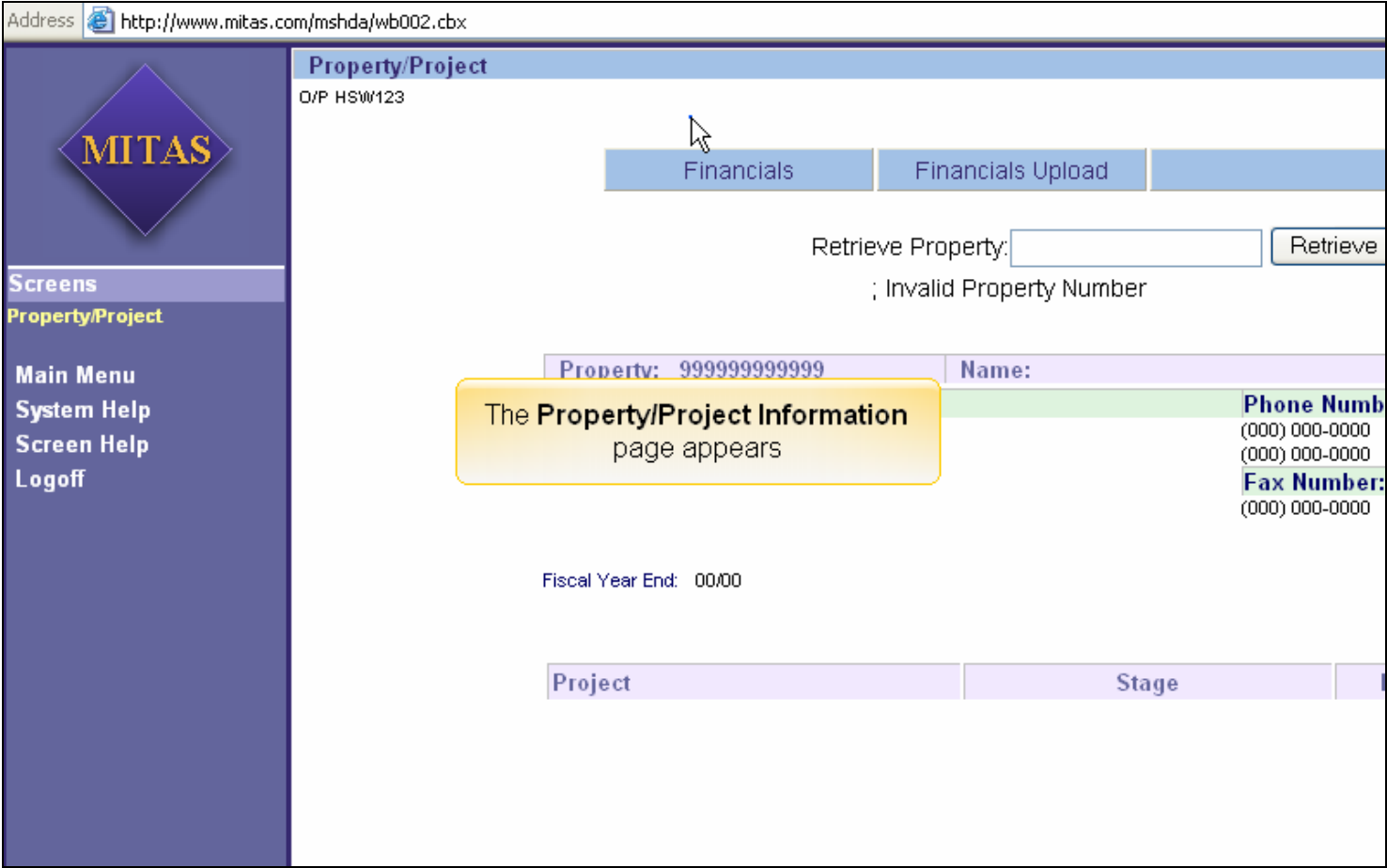
## Text Captions

The **Main Menu** page appears

Select the **Property/Project Detail** menu item

## Notes

Slide 18 - Slide 18



Text Captions

The **Property/Project Information** page appears

Notes

Slide 19 - Slide 19

Property/Project

O/P HSW123

Run: 02/25/2005(1

Financials

Financials Upload

For security reasons, you must know the property number for which you are trying to create a transaction

Retrieve Property: Highlight Box Retrieve

he Property you requested.; In Mid Property Number

Select the Retrieve Property text box, and input the Property Number

Property: 999999999999 Name:

Property Address:

er: Ext: 0000 0000

(000) 000-0000

Fax Number: 0000

(000) 000-0000

Fiscal Year End: 00/00

Project Stage Date

Text Captions

Select the **Retrieve Property** text box, and input the Property Number

For security reasons, you must know the property number for which you are trying to create a transaction

Notes



Slide 20 - Slide 20

Property/Project

O/P HSW123

Run: 02/25/2005(1

Financials

Financials Upload

Retrieve Property: 

Retrieve

Unable to find the Property you requested.; Invalid Property Number

Property: 999999999999

Name:

Property Address:

Phone Number:

Ext:

Fax Number:

(000) 000-0000

0000

(000) 000-0000

0000

(000) 000-0000

Fiscal Year End: 00/00

Project

Stage

Date

Click the **Retrieve** button

Text Captions

Click the **Retrieve** button

Notes

## Slide 22 - Slide 22

**Property/Project**

O/P HSW123 Run: 02/25/2005(1

FinancialsFinancials Upload

Verify the property address information is not correct

Click the **Financials Upload** button to upload financial data

**Property:** 0770

**Name:** WOODLAND HILLS

**Property Address:**  
WOODLAND HILLS  
DON JAMES  
2005 MASON  
MCKINNEY, TX 75071

**Phone Number:** (972) 911-9119  
**Ext:** 1111  
(000) 000-0000 0000

**Fax Number:**  
(000) 000-0000

The **Property/Project Information** page appears with the property data

Fiscal Year End: 12/31

Project	Stage	Date
---------	-------	------

## Text Captions

The **Property/Project Information** page appears with the property data

Verify the property address information is correct. If the information is not correct, contact the agency.

Click the **Financials Upload** button to upload financial data

## Notes

## Slide 24 - Slide 24

**Financials Upload**

O/P HSW197 Run: 02/25/2005(1

<b>Property:</b> 0770	<b>Name:</b> WOODLAND HILLS
-----------------------	-----------------------------

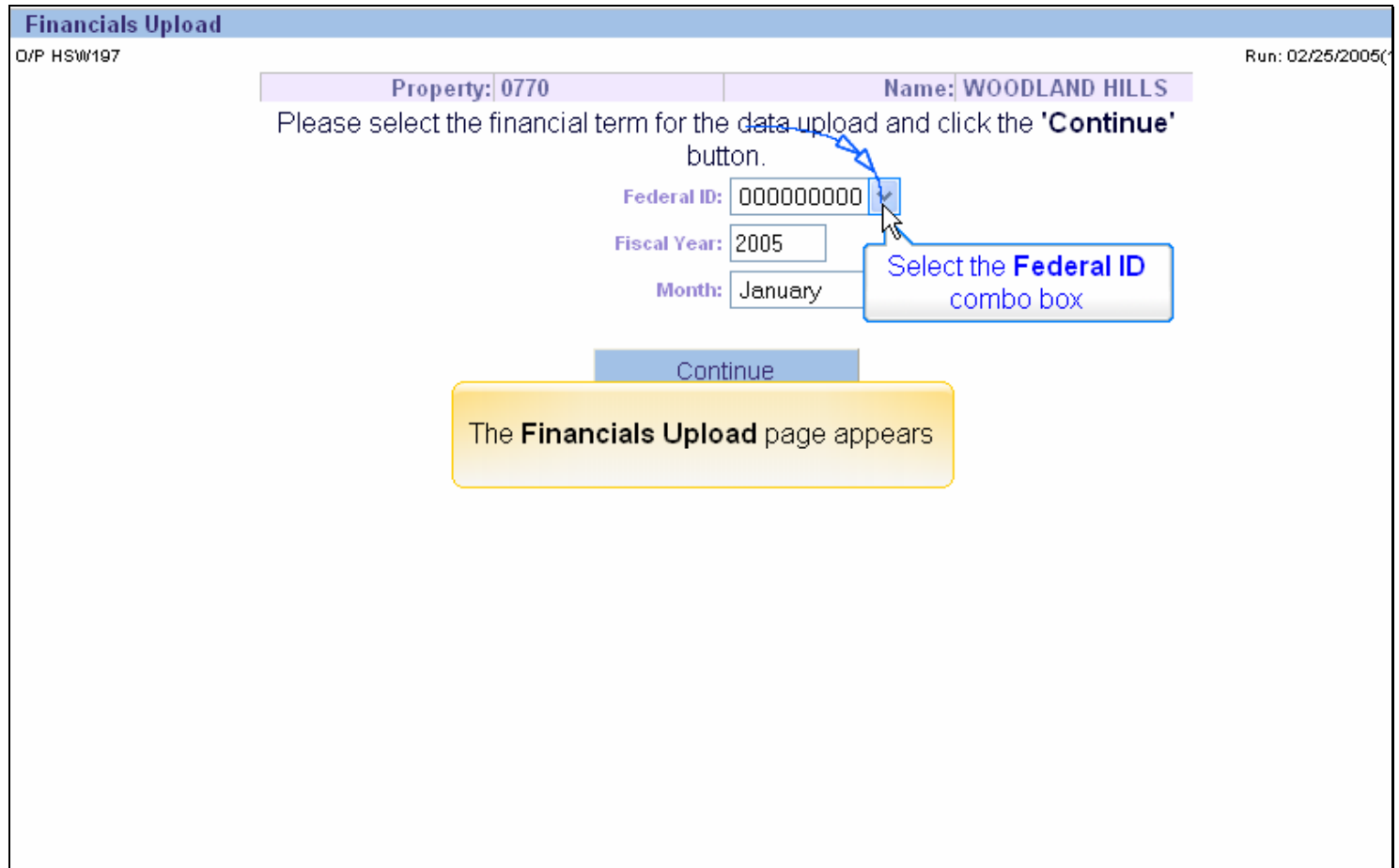
Please select the financial term for the data upload and click the '**Continue**' button.

**Federal ID:**

**Fiscal Year:**

**Month:**

The **Financials Upload** page appears

The screenshot shows a web form titled "Financials Upload". At the top, it displays "O/P HSW197" on the left and "Run: 02/25/2005(1" on the right. Below this is a table with two columns: "Property:" with value "0770" and "Name:" with value "WOODLAND HILLS". A text instruction says "Please select the financial term for the data upload and click the 'Continue' button." Below the instruction are three input fields: "Federal ID:" with a text box containing "000000000", "Fiscal Year:" with a text box containing "2005", and "Month:" with a text box containing "January". A blue callout box with an arrow points to the Federal ID text box, containing the text "Select the Federal ID combo box". Below the input fields is a blue "Continue" button. At the bottom, a yellow box contains the text "The Financials Upload page appears".

## Text Captions

The **Financials Upload** page appears

Select the **Federal ID** combo box

## Notes

Slide 25 - Slide 25

Financials Upload

O/P HSW197

Run: 02/25/2005(1

Property: 0770

Name: WOODLAND HILLS

Please select the financial term for the data upload and click the 'Continue' button.

Federal ID: 000000000

Fiscal Year: 000000000

Month: 000000000

Continue

Select the appropriate Federal ID item

Text Captions

Select the appropriate Federal ID item

Notes

## Slide 26 - Slide 26

**Financials Upload**

O/P HSW197Run: 02/25/2005(1

<b>Property:</b>	0770	<b>Name:</b>	WOODLAND HILLS
------------------	------	--------------	----------------

Please select the financial term for the data upload and click the '**Continue**' button.

**Federal ID:**

**Fiscal Year:**

**Month:**

Select the **Fiscal Year** text box, and input the appropriate fiscal year for which to upload financial data

## Text Captions

Select the **Fiscal Year** text box, and input the appropriate fiscal year for which to upload financial data

## Notes

## Slide 27 - Slide 27

**Financials Upload**

O/P HSW197

Run: 02/25/2005(1

**Property:** 0770

**Name:** WOODLAND HILLS

Please select the financial term for the data upload and click the '**Continue**' button.

**Federal ID:** 000000000

**Fiscal Year:** 2005

**Month:** Highlight Box

Continue

Select the **Month** combo box

Text Captions

Select the **Month** combo box

Notes

## Slide 28 - Slide 28

**Financials Upload**

O/P HSW197 Run: 02/25/2005(1

<b>Property:</b> 0770	<b>Name:</b> WOODLAND HILLS
-----------------------	-----------------------------

Please select the financial term for the data upload and click the '**Continue**' button.

**Federal ID:** 0000000000

**Fiscal Year:** 2004

**Month:** January

Cont

Select the appropriate Month item

Text Captions

Select the appropriate Month item

Notes

## Slide 29 - Slide 29

**Financials Upload**

O/P HSW197Run: 02/25/2005(1

<b>Property:</b> 0770	<b>Name:</b> WOODLAND HILLS
-----------------------	-----------------------------

Please select the financial term for the data upload and click the '**Continue**' button.

**Federal ID:** 0000000000 ▾

**Fiscal Year:** 2004

**Month:** September ▾

**Continue**  
Highlight box

Click the **Continue** button

Text Captions

Click the **Continue** button

Notes



## Slide 31 - Slide 31

**Financials Upload**

O/P HSW197 Run: 02/25/2005(1

### Financial Data Upload

The file containing the financial data to be uploaded must be saved as a **CSV** (comma delimited) file type. This is a common file type option available when saving a file using a spreadsheet.

Create the data file. Enter the path and file name (Example: "C:\uploads\datafile.txt"). Then click the "Process Now" button to load the data file.

the "Upload!" button (Example: "Upload!"). Then click the "Process Now" button to load the data file.

Enter the path and file name to upload:

Select the **Path and File Name to Upload** text box, and input the path and file name of the file containing the financial data. If you do not know the path and file name, click the **Browse** button to search for the file.

## Text Captions

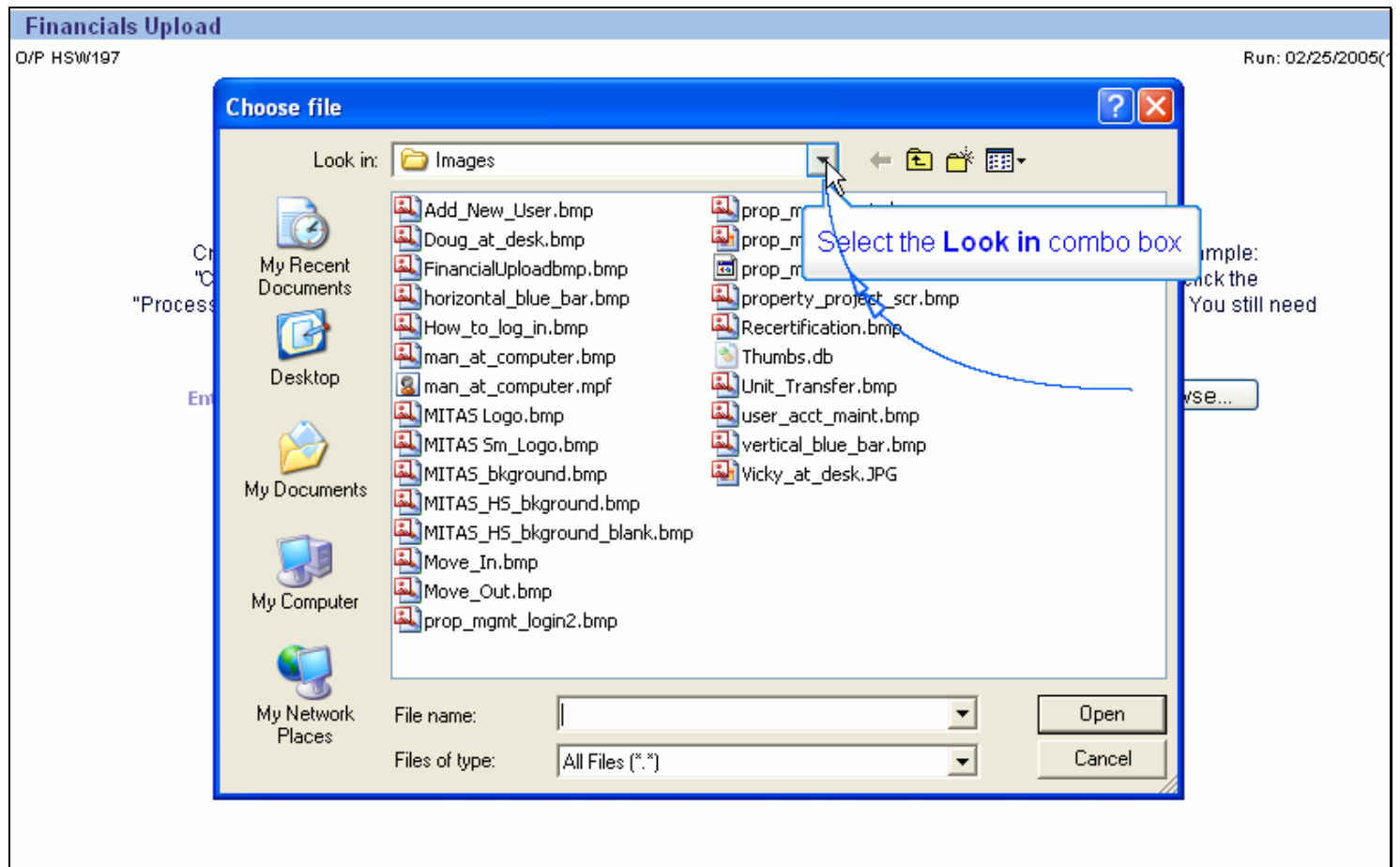
The **Financials Upload** page appears

Select the **Path and File Name to Upload** text box, and input the path and file name of the file containing the financial data. If you do not know the path and file name, click the **Browse** button to search for the file.

The file containing the financial data to be uploaded must be saved as a **CSV** (comma delimited) file type. This is a common file type option available when saving a file using a spreadsheet.

## Notes

## Slide 32 - Slide 32

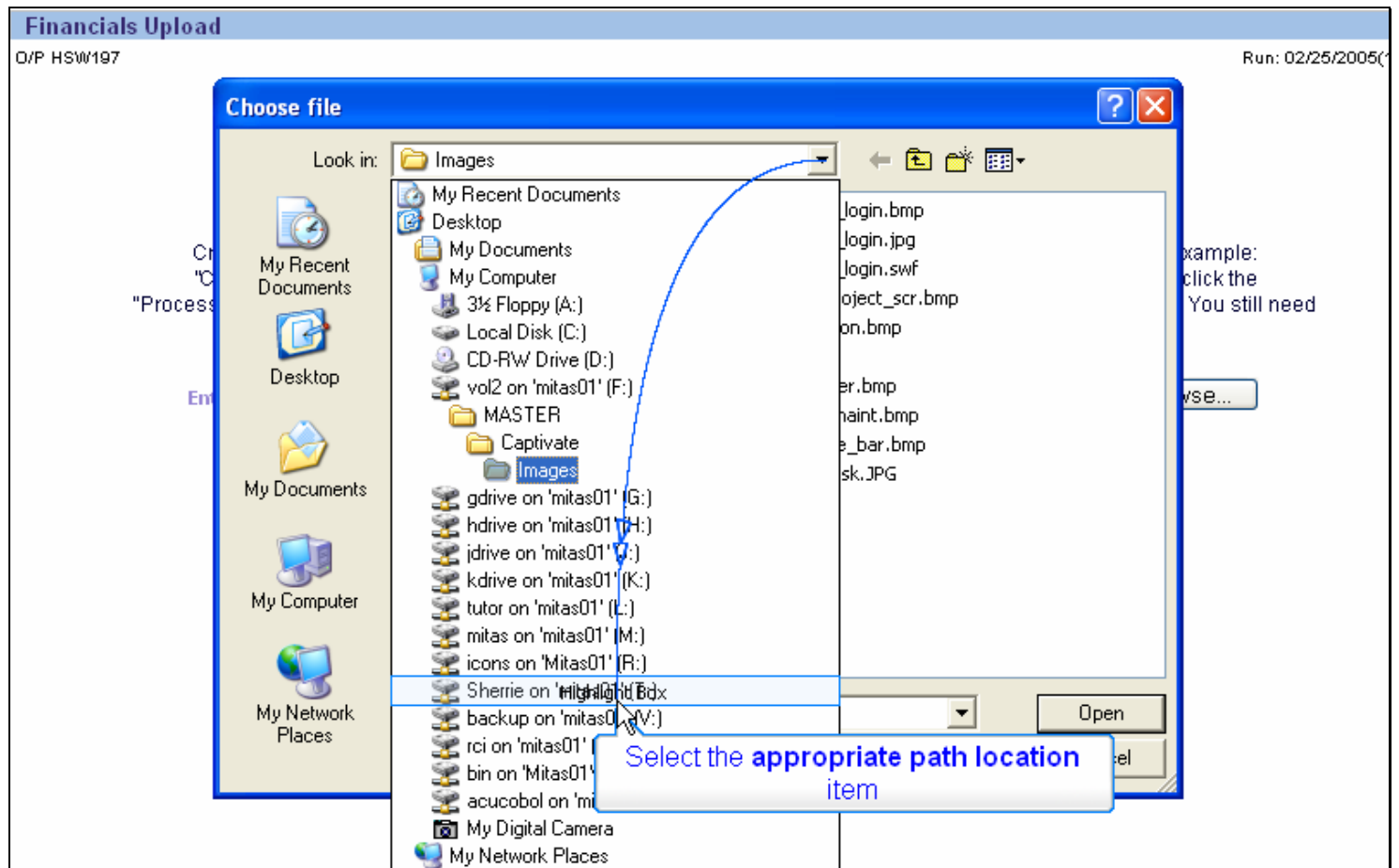


## Text Captions

Select the Look in combo box

## Notes

## Slide 33 - Slide 33

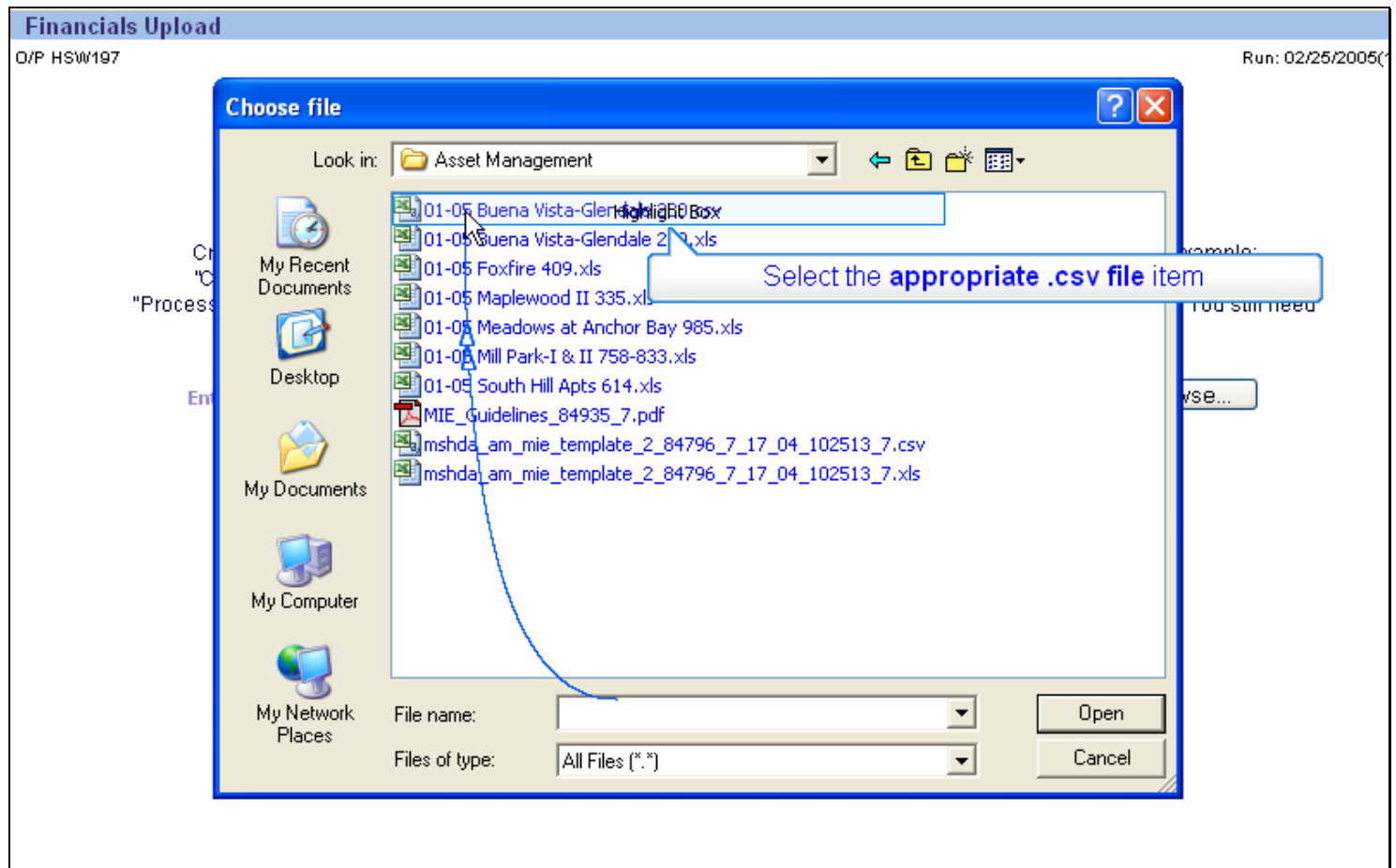


Text Captions

Select the appropriate path location item

Notes

## Slide 34 - Slide 34



## Text Captions

Select the appropriate .csv file item

## Notes

Slide 35 - Slide 35

Financials Upload

O/P HSW197

Run: 02/25/2005(1

Choose file

Look in: Asset Management

01-05 Buena Vista-Glendale 280.csv

01-05 Buena Vista-Glendale 280.xls

01-05 Foxfire 409.xls

01-05 Maplewood II 335.xls

01-05 Meadows at Anchor Bay 985.xls

01-05 Mill Park-I & II 758-833.xls

01-05 South Hill Apts 614.xls

MIE\_Guidelines\_84935\_7.pdf

mshda\_am\_mie\_template\_2\_84796\_7\_17\_04\_102513\_7.csv

mshda\_am\_mie\_template\_2\_84796\_7\_17\_04\_102513\_7.xls

File name: 01-05 Buena Vista-Glendale 280.csv

Files of type: All Files (\*.\*)

Highlight Box

Open

Cancel

Click the **Open** button

Text Captions

Click the **Open** button

Notes

## Slide 36 - Slide 36

**Financials Upload**

O/P HSW197Run: 02/25/2005(1

## Financial Data Upload

Create the data file. Enter the path and file name of the file created below, and click the "Upload!" button (Example: "C:\uploads\datafile.txt"). The file will be copied to our server, of which you will receive confirmation. Then click the "Process Now" button to load the information and you will be presented with a link to a processing errors report. You still need to verify the data as some fields may not be contained in the data file.

Enter the path and file name to upload:

Highlight

Click the **Upload** button

Text Captions

Click the **Upload** button

Notes

## Slide 38 - Slide 38

## Data Import Interface

**File Uploaded Successfully!**

You must process the file. The **Data Import Interface** page appears processed.

The **Data Import Interface** page appears

Highlight Box

Click the **Process Now** button

## Text Captions

The **Data Import Interface** page appears

Click the **Process Now** button

## Notes

## Slide 40 - Slide 40

The screenshot shows a web interface titled "Financials Upload". In the top left corner, it says "O/P HSW197". In the top right corner, it says "Run: 02/25/2005(1". The main content area has a light blue background. At the top, there is a text instruction: "Please click [this link](#) to review the transaction upload errors, click the "Back" button or the "MainMenu" button when done." Below this, a blue-bordered box contains the text: "Select the [this link](#) link to view the transaction upload error report". A blue arrow points from this box to the "this link" in the instruction above. At the bottom center, there is a yellow rounded rectangle with the text: "The **Financials Upload Completion** page appears".

## Text Captions

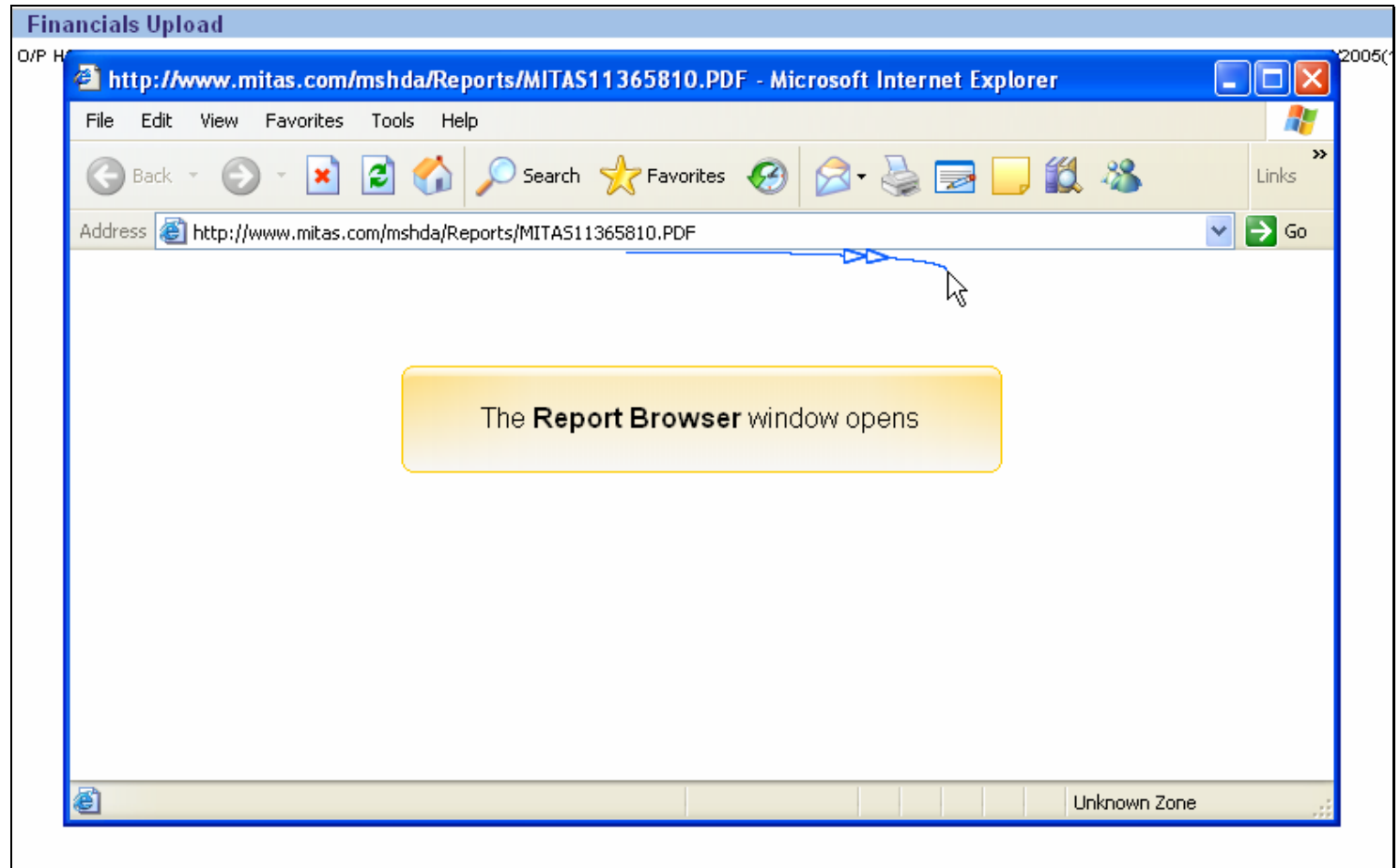
The **Financials Upload Completion** page appears

Select the [this link](#) link to view the transaction upload error report

## Notes



## Slide 42 - Slide 42

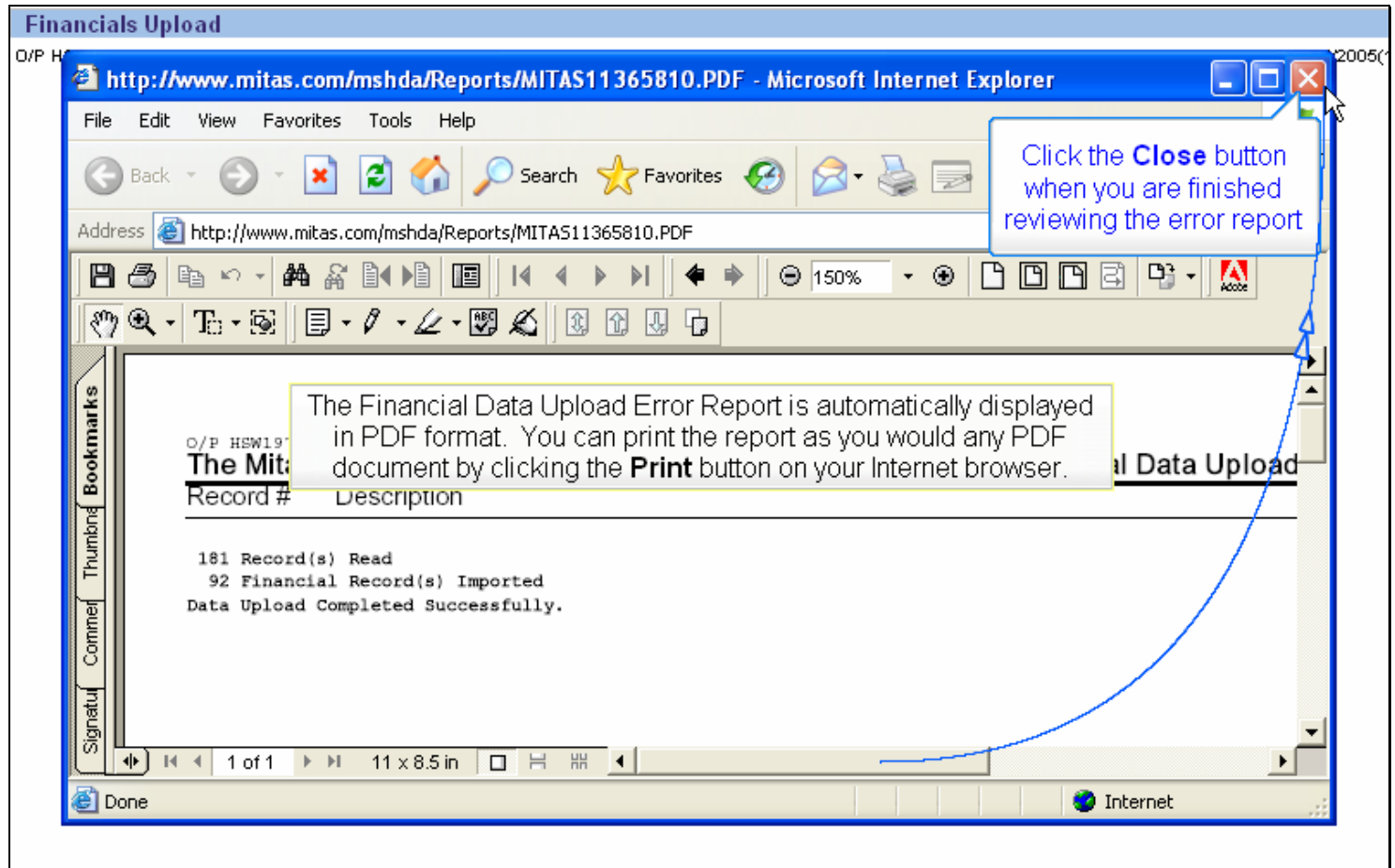


## Text Captions

The **Report Browser** window opens

## Notes

## Slide 44 - Slide 44



## Text Captions

Click the **Close** button when you are finished reviewing the error report

The **Financial Data Upload** report is displayed

The Financial Data Upload Error Report is automatically displayed in PDF format. You can print the report as you would any PDF document by clicking the **Print** button on your Internet browser.

## Notes

## Slide 45 - Slide 45

Financials Upload

O/P HSW197

Run: 02/25/2005(1

Please click [this link](#) to review the transaction upload errors, click the "Back" button or the "MainMenu" button when done.

The **Financials Upload Completion** page appears

## Text Captions

The **Financials Upload Completion** page appears

## Notes

## Slide 46 - Slide 46

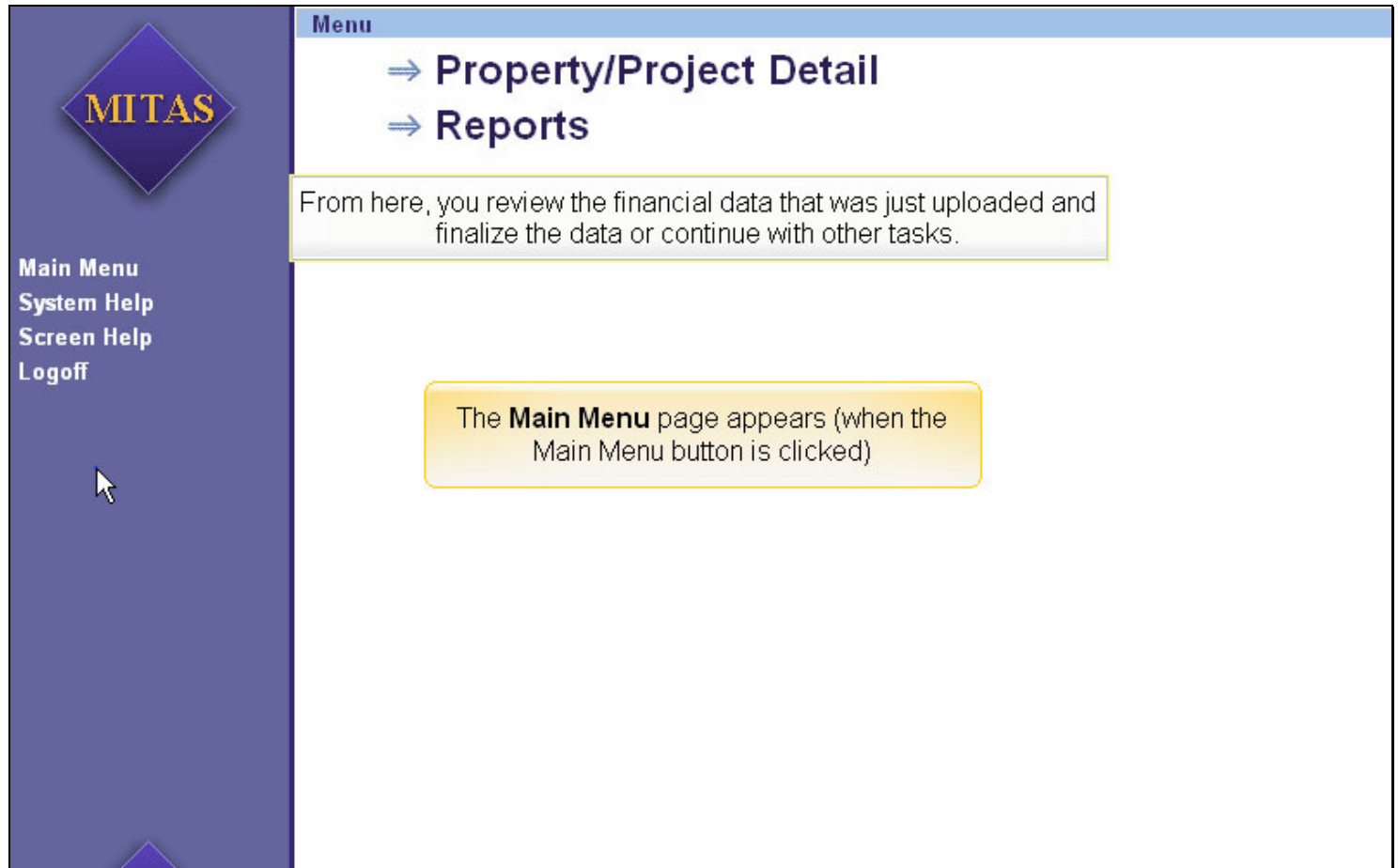
The screenshot shows the MITAS Financials Upload interface. On the left is a dark blue sidebar with the MITAS logo at the top. Below the logo are menu items: Screens, Financials Upload (highlighted in yellow), Options, a Back button, Main Menu (highlighted with a blue box and a mouse cursor), System Help, Screen Help, and Logoff. The main content area has a light blue header titled 'Financials Upload' and a sub-header 'O/P HSW197'. Below this, there is a line of text: 'Please click [this link](#) to review the transaction upload errors, click the "Back" button "MainMenu" button when done.' A blue curved arrow points from the 'this link' text to the 'Back' button in the sidebar. Another blue curved arrow points from the 'MainMenu' button in the sidebar to the same line of text. A white callout box with a blue border points to the 'Main Menu' button in the sidebar, containing the text: 'Click the **Back** button or **Main Menu** button when you finished'.

## Text Captions

Click the **Back** button or **Main Menu** button when you finished

## Notes

Slide 48 - Slide 48



Text Captions

The **Main Menu** page appears (when the Main Menu button is clicked)

From here, you review the financial data that was just uploaded and finalize the data or continue with other tasks.

Notes

**Slide 49 - End**



**Congratulations!**  
**You have completed Asset Management Automatic**  
**Financials Upload on the MITAS Internet Property**  
**Management site.**

**Text Captions**

**Congratulations!**  
**You have completed Asset Management Automatic Financials Upload on the MITAS Internet Property**  
**Management site.**

**Notes**